PMI® Leadership Institute Meeting 2018—North America
Call for Presentations Proposal Worksheet

Deadline for Online Submissions:
Monday, 26 March 2018 at 11:59 PM (Eastern Time)

This worksheet is being provided as a planning tool for potential submitters. You are encouraged to use this worksheet to prepare your proposal prior to submitting your information to the Call for Presentation platform. *Please note that all submissions must be submitted to the Call for Presentation Website.

Questions regarding the process can be directed to the PMI Leadership Institute Team at Leadership.Institute@pmi.org.

Leadership Institute Meetings provide professional and peer-to-peer training and leadership development designed to enhance the capabilities of PMI’s volunteer chapter leaders. All presentation proposals should be focused and applicable to the skills, discipline and opportunities required to lead PMI chapters. Presentations that visibly market or endorse commercial products and services will not be accepted. Also, topics related to project management may not be applicable to the Leadership Institute Meeting and might be a better fit for a PMI Global Congress or the PMI Global Conference.

We are currently seeking proposals that outline specific results that your chapter has seen in the following areas:

- Effective chapter programs that had positive results on your membership acquisition and/or retention programs (please share the results in your proposal).
- Innovative ideas that your chapter has implemented to engage PMI certification holders (any of PMI’s certifications) or potential PMI certification holders in your chapter’s activities. How have you included and utilized PMI’s Talent Triangle?
- Effective programs for the recruitment, retention and recognition of your chapter volunteers.
- Innovative approaches to succession and transition planning for your volunteer chapter leadership.
- Successful social media or communications programs that had a positive outcome on a chapter event and/or your membership acquisition or retention efforts (please share the outcome in your proposal).

If your presentation proposal is selected and all deadlines have been met, PMI will grant each presenter a complimentary registration for the LIM. PMI will grant a complimentary registration for up to two (2) co-presenters. Presenters will not be able to add co-presenters to a session if they are not listed at the time of proposal submission.

The PMI LIM Team will inform you of your scheduled date and time of your presentation to best fit the requirements of the event. Requests to alter date/time assignments will not be accepted.

All proposals will be reviewed and scored by a team of volunteers and PMI staff in each of the following categories:

- Relevance to Leadership Institute Meeting attendees
- A well-defined topic with focused objectives
- Practical application of material
• Timeliness of topic
• Original material
• Overall perceived level and quality of session content
• Completeness of presentation proposal

If your presentation proposal is accepted, you will receive an e-mail invitation to present and will have 7 days to accept or decline the invitation.

**PRESENTER ACKNOWLEDGEMENT AND ACCEPTANCE OF STANDARD CONDITIONS AGREEMENT**
All submitters and co-presenters are required to agree to the PMI® Leadership Institute Meeting Presenter Acknowledgement and Acceptance of Standard Conditions Agreement. Submitters are required to review this agreement BEFORE submitting their presentation proposal. By submitting a presentation proposal, the submitter acknowledges that he/she has reviewed and agrees to the terms of this agreement. [Download Agreement]

**PRESENTER AND CO-PRESENTER INFORMATION**
At the time of submission, the submitter will be asked to provide the following information:

• First and Last Name
• PMI Credential(s)
• Email Address
• Chapter or Volunteer Group
• Chapter or Volunteer Group Title
• PMI Region
• Job Title
• Company Name
• Biography for website
• Biography for Introductions
• Twitter handle
• High-Resolution Photo or Headshot

Should your proposal be selected, this information will be used in event promotional materials, such as the website and mobile app (if applicable). Your session title and description may be edited by the PMI editing team if necessary. If the submitter intends to have co-presenters for their session (maximum 2), you will also provide the above information on their behalf. Please note: if the proposal is accepted, changing or adding co-presenters will not be approved.

**TRACKS**
Please select one topic that best fits your proposal:

☐ **Academic Track**
This track is appropriate for chapter leaders who are involved with or thinking about academic outreach efforts in their chapters. It is intended to give an overview of various PMI resources to help chapters with their academic outreach efforts and also to showcase successful chapter outreach programs.

☐ **Association Governance Track**
This track is appropriate for all chapter leaders, regardless of their roles. It is intended to provide guidance and best practices for the successful management of PMI chapters.
- **Financial Management Track**  
  This track is appropriate for chapter leaders who are responsible for maintaining and presenting all financial records required for chapter operations.

- **Leadership Development Track**  
  This track is appropriate for all chapter leaders, regardless of their roles. It is intended to provide guidance to help chapter leaders develop their personal and professional leadership skills.

- **Marketing & Communications Track**  
  This track is appropriate for chapter leaders who are involved in marketing and social media efforts for their chapters. It is intended to provide guidance on PMI resources in this area and also showcase successful chapter marketing programs.

- **Membership Track**  
  This track is appropriate for chapter leaders who are in a membership role. It is intended to provide best practices in these areas and also provide guidance on the PMI resources available to chapters.

- **PMI Updates, Tools & Resources Track**  
  This track is appropriate for all chapter leaders, regardless of their roles. It is intended to provide updates and information on PMI initiatives, tools and resources available to chapter leaders.

- **Professional Development Track**  
  This track is appropriate for chapter leaders who are responsible for the development of chapter educational activities or managing chapter professional development programs.

- **Technology Track**  
  This track is appropriate for chapter leaders who are involved in a technology role. It is intended to provide guidance on PMI resources available in the area of technology and to showcase best practices in PMI chapters.

- **Volunteer Engagement Track**  
  This track is appropriate for chapter leaders who are involved in a volunteer coordination role. It is intended to provide guidance on PMI resources available in the area of volunteer engagement and to showcase best and successful chapter programs.

**PRESENTATION FORMAT**  
What is your preferred method of delivery? Choose one format that best represents your proposal:

- **Educational Session** (75 minutes): Informal presentations that include audience participation. Most sessions co-presented with a PMI staff member. Speakers must have presented at a previous LIM to be eligible for this type of session.

- **Panel Session** (75 minutes): Shared presentation with other volunteers and/or PMI staff around a topic of relevance to PMI chapters. Speakers must have presented at a previous LIM to be eligible for this type of session.

- **Chapter Learn and Share Session** (45 minutes): Short, focused sessions where PMI chapter leaders can share a successful program or initiative in their chapter. Recommended for speakers who have never presented at a LIM.
☐ Workshop (120 minutes): Extended sessions where speakers and facilitators present material and include interactive activities. Speakers must have presented at a previous LIM to be eligible for this type of session.

Please note that if your proposal is selected, we will do our best to accommodate your preference. However, we may contact you regarding alternate methods of delivering your presentation, such as part of a workshop or partnered with another speaker to deliver a joint presentation.

AUDIENCE EXPERIENCE LEVEL
Choose one that best fits the expectation of the audience applicable to your presentation.

☐ New: A new leader is brand new in their chapter or global volunteer role. Typically, this is their first Leadership Institute Meeting.

☐ Intermediate: An intermediate leader has been in a leadership role with PMI for a few years. They have probably attended at least one LIM in the past.

☐ Seasoned: A seasoned leader has been in various leadership roles with PMI. They are experienced and looking for more advanced-level content.

PROFESSIONAL DEVELOPMENT UNIT (PDU) ALLOCATIONS / LEVERAGING THE PMI TALENT TRIANGLE
Which part of the PMI Talent Triangle is most relevant to your proposed presentation? If your proposal is selected, this information is used to allocate professional development units (PDUs) for your session.

☐ Leadership Skills
Knowledge, skills and behaviors specific to leadership. Skills that help an organization achieve its business goals (ex. negotiation, communication, motivation, problem solving and related competencies).

☐ Strategic Business Management Skills
Knowledge of and expertise in the industry/organization that enhances performance and better delivers business outcomes (ex. strategic alignment, innovation, finance, transformation, marketing, operational functions, etc.).

☐ Technical Skills
Knowledge, skills and behaviors related to specific domains of project, program and portfolio management. The technical aspects of performing one’s job/role (ex. project management, product knowledge, industry knowledge).

Please estimate approximately what percentage of your session time will be spent on the following topics. Your selections should add up to 100%. This information will be used to allocate professional development units (PDUs) for PMI credentials for your session, if your proposal is selected.

What percentage of time during this presentation will focus on:

Leadership Skills: _____%

Strategic Business Management Skills: _____%

Technical Skills: (please indicate all that apply)
- General project management skills and best practices: _____%
- General program management skills and best practices: _____%
- General portfolio management skills and best practices: _____%
Project Risk Management: _____%
Project Scheduling and/or Resource Management: _____%
Agile Tools and Techniques: _____%
Business Analysis and/or Requirements Management: _____%

TOTAL: 100%

PROPOSED PRESENTATION TITLE (maximum 12 words)
A good title is important and the first opportunity to attract attendees to join your presentation.

PRESENTATION DESCRIPTION (maximum 75 words)
If selected, this description will be used in event marketing materials, such as the website, mobile app (if applicable) and the on-site guide. Similar to the title, a good description is very important. Please be as precise as possible. Please note that the PMI editing team might edit, change or shorten your description.

LEARNING OBJECTIVES (maximum 20 words) A learning objective explains what the attendees will learn after participating in your session. At the conclusion of this session, attendees will be able to:

Learning Objective 1:

Learning Objective 2:
**PROPOSAL FULL DETAILS** (maximum 600 words) The information here will provide LIM Content Reviewers additional opportunity to learn about your proposal. Refrain from copying your presentation description or learning objective(s) here as this is your opportunity to include additional details about your presentation. If you plan on including attendee activities or an interactive component to your proposed session, please detail it here.

![Proposal Details](image)

**Are you comfortable presenting in English?**

- [ ] Yes
- [ ] No

**PRESENTATION HISTORY**

Have you presented at a Leadership Institute Meeting in the past? If so, please include the name of the LIM and presentation topic.

- [ ] Yes
- [ ] No

**Name of Past LIM and Presentation Topic**

![Past Presentation](image)

**SAMPLE PRESENTATION RECORDING**

To complete the submission process, please submit a sample presentation that demonstrates your facilitation/speaker style. Your file should be saved as Last Name_First Name and Proposal Title. The video should be no longer than one minute in length and no larger than 10MB. It should show you presenting your proposal’s learning objectives. Your recording should simulate your presentation style. Please do not read your objectives or script. If you have a recording already hosted online (YouTube, etc.), please include the website URL below. Note, the video must be public so that we can access it.

Submissions without a sample presentation recording will be considered incomplete and will not be considered for the LIM.

**Sample Recording:** file name or URL
We thank you for your interest in presenting at a PMI Leadership Institute Meeting, and we look forward to seeing you at a future LIM!

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